



THE TAMPA BAY ESTATE PLANNING COUNCIL

2023-2024 Member Information

Contact Information (please print)

Name _____

Firm _____

Address _____

City _____ ZIP _____

Phone _____

Email _____ Do

not publish email Do not publish

Have you ever been a member of this Council? Yes No If yes, last year of your membership _____

Membership Discipline (please select one)

Attorney & member of the Florida Bar
Year admitted to Florida Bar _____

Insurance professional as

Chartered Life Underwriter (CLU)

Certified Public Accountant (CPA)

Chartered Financial Consultant (ChFC)

Trust Officer of a Registered Regulated Trust Dept.

MDRT Qualifying or Life Member

CFP® professional Year certified _____

Signature: _____ member-get-a-member

Required Recommendations

- One TBEPC member from the same member discipline, and
- One TBEPC member from a different member discipline, and
- A letter of recommendation from any TBEPC member.

**Primary Signature will receive credit for context

Recommended by (must be current members)

**Primary Signature _____

Print Name _____

Discipline _____

Secondary Signature _____

Print Name _____

Discipline _____

Member Renewal

\$200 if received by September 6, 2023

\$225 if received between September 7 – December 31, 2023

Emeritus Renewal: \$175

Send completed form, letter of recommendation and check made payable to Tampa Bay Estate Planning Council

**Tampa Bay Estate Planning Council
12191 W Linebaugh Ave #312
Tampa, FL 33626**